G E T
GUARANTEED EDUCATION TUITION

Washington State
Guaranteed Education Tuition (GET)
Program

INSTITUTION HANDBOOK
FOR
GET STUDENT BENEFITS

2002-2003 Academic Year

GET: 1-800-955-2318
E-mail: GETInfo@hecb.wa.gov

TABLE OF CONTENTS

SECTION I: NEW THIS YEAR

Here is a quick reference to changes that are new to the process this year.

- Effective Sept. 1, 2002, students may use up to **125** units per year (previous limit was 100 units), in addition to any units left from a previous year.
- On-line viewing of the Eligibility Roster is available. See Section VI: ELIGIBILITY ROSTER.
- The Student Notification Form replaces the GET Identification Card.

SECTION II: GENERAL INFORMATION

The GET program is an Internal Revenue Service Code Section 529 qualified state tuition plan and is governed by federal IRS rules and Washington State law (Chapter 28B.95 RCW). All requirements for the use of GET benefits must follow both federal and state guidelines. The basic design of the program allows families to prepay for college tuition by purchasing GET units for use at a later date.

The GET Program expects approximately 1,200 students to be eligible to use their GET funds in academic year 2002-2003.

Definitions

Throughout this handbook you will find the following terms:

Purchaser – the person who originally set up the GET account.
Student Beneficiary – the person who is named on the account to use the GET units that have been purchased.
GET Benefits – the dollar value of your GET units available for use.
Benefit Use Year – the year listed on the GET account as the anticipated date the student will begin using GET benefits.

Student Eligibility Requirements to use GET Benefits

Before a student may use GET units, he/she must meet the following requirements:
1. The student beneficiary must have reached the benefit use year.
2. Units must have been held for two years:
   - Custom Monthly Plan – The account must have been open for two years, and must be paid in full.
   - Lump Sum Plan – Any units purchased at least two years before the benefit use date are eligible for use, up to a maximum of 125 units per year. **Please note** that because each unit purchased on a Lump Sum Plan is eligible for use after a two-year wait, the balance on a student's account could change periodically as units become available for use.

Eligible Educational Expenses

Students may use GET benefits to pay for any of the following eligible educational expenses, **if sufficient funds are available in the student's GET account** (please refer to the Eligibility Roster). Although the GET program is designed to pay primarily for tuition and fees, it is the responsibility of the student to determine how GET benefits will be used and to notify the school accordingly.

Tuition — Full-time or part-time tuition (GET benefits may pay for credit hours above 18 credit hours per quarter or semester, providing there are sufficient funds eligible for use in the student's GET account). **The school must directly invoice the GET Program for tuition and fees.**

Fees — These include state-mandated fees and other school-specific fees billed by the college or university, such as technology fees, lab fees, equipment fees, etc. **The school must directly invoice the GET Program for tuition and fees.**

Summer School – Students intending to use GET units to attend school during the summer term may do so if there are eligible units remaining in their accounts. **The school must directly invoice the GET Program for tuition and fees.**

Books, supplies, and equipment required for enrollment or attendance — These items are eligible for reimbursement only. To receive reimbursement for books, supplies and/or equipment, the student must submit a Reimbursement Request Form directly to the GET Program office with supporting documentation.

Room and board — GET benefits may be used to pay for both on- and off-campus housing.

- **On-campus (owned or operated by the school)** — The maximum unit amount available for on-campus room and board may not exceed the amount normally assessed most residents for room and board at that school. **The school must directly invoice the GET Program for on-campus housing**.
  Note: If billing from the school is not available (e.g. on-campus sorority or fraternity), the student should submit a Reimbursement Request Form - Housing Only to the GET Program office.

- **Off-campus – not living with parents or guardians** — For students living off-campus and not at home, the maximum amount available for housing in an academic year is **$2,500**. These expenses are reimbursable. The student must fill out the **Reimbursement Request Form - Housing Only** and submit it to the GET Program Office.

- **Off-campus – living with parents or guardians** – For students living off-campus at home with parents or guardians, the maximum available for housing reimbursement in an academic year is **$1,500**. The student must fill out the **Reimbursement Request Form - Housing Only** and send it to the GET Program Office.

- **Special needs** — GET benefits may be used to reimburse for expenses of a special needs student that are necessary in connection with the student's enrollment or attendance at an eligible school. The student must contact the GET Program office to determine what documentation will be required before he/she registers.

Graduate school — GET benefits can be used to cover expenses associated with graduate or professional school. Payment for tuition and state-mandated fees at graduate schools will not exceed the amount available for use in the student's GET account. The student is responsible for any additional difference in cost. **The school must directly invoice the GET Program for tuition and fees.**

Determining the Payout Value of a GET Unit

The annual value of each GET unit purchased is based on one percent of the resident undergraduate tuition, plus state-mandated fees[1] for the highest-priced Washington public university for the 2002-03 academic year. The value is adjusted each year based on new tuition rates.

The maximum amount available for this academic year is determined by multiplying the units eligible for usage by the GET unit value. The units eligible for usage for the 2002-03 academic year will be on the Account Summary and on the Eligibility Roster. The GET unit value is determined after the universities set their tuition and fee rates for the academic year. The Eligibility Roster will indicate the number of units available for use for the student for the entire academic year.

The value of a GET unit for the 2002-03 academic year will be posted on the GET Web site: www.get.wa.gov, on the Eligibility Roster, and/or may be obtained by contacting the Program office after July 15, 2002.   If the information is available before the Student Handbooks are mailed, it will be included on the Account Summary.

It is the student's responsibility to notify the school that he/she intends to use GET benefits by completing and submitting the School Notification Form.

SECTION III: SCHOOL NOTIFICATION FORM - Student Submits to Institution

The School Notification Form is designed to let the school know when and how students plan to use their GET benefits. This form helps the student in budgeting for the year, avoiding any year-end surprises, such as insufficient funds to cover tuition and state-mandated fees, and indicates to the school how much to bill the GET program.   The Account Summary may serve as proof that the student has GET units available to use during the academic year. Institutions may also verify the student's information by checking the Eligibility Roster.

Students should complete the School Notification Form and submit it to the institution they intend to enroll in, at the time of registration, with a copy of their Account Summary Statement. The GET program does not need a copy of the School Notification Form.

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[1] State-mandated fees are only those listed by statute, which includes operating, building and student activities fees. They do not include institutionally mandated fees that may be required of each individual school. Schools may impose their own fees such as technology, library, etc. These fees are not considered state-mandated fees and therefore are not covered in the payout value amount.

How GET Units are Paid

The student is responsible for notifying the school that he/she plans to use GET benefits for tuition and/or on-campus housing.

The school should send an invoice to the GET program directly for tuition, on-campus room and board, and/or other fees billed by the individual school, such as technology fees, lab fees, equipment fees, etc.

To use GET benefits for other eligible expenses including books, supplies, and off-campus housing, the student must complete a Reimbursement Request Form. There are two Reimbursement Request Forms: Housing Only and Other Qualified Educational Expenses. Students may obtain reimbursement forms online at www.get.wa.gov or from the GET Program office.

Important note: When the school sends an invoice to the GET Program for tuition, fees, room and board or other eligible expenses, the program will pay the bill up to the current amount eligible for use in the student's GET account, not to exceed 125 units per year.[1] The program will pay invoices and reimbursements in the order received until the student's GET benefits for the year are exhausted.

Where GET Benefits May be Used

GET benefits may be used at any accredited public or private four-year university or college, two-year college, vocational, or technical school in the United States. Generally, any school that accepts federal financial aid is eligible to receive GET benefits.

GET benefits may not cover all tuition and fees at private or out-of-state schools. The GET program does not guarantee a student will be classified as an in-state resident tuition or admission to any school.

It is the student's responsibility to cover all costs beyond what is eligible for use in his/her GET account.

Scholarship Recipient

If a student receives a scholarship, waiver or similar tuition subsidy, and will not be using GET benefits for tuition and fees, he/she has the option of using the available GET benefits for other eligible educational expenses, waiting and using them in the future, transferring them to another family member, or requesting a refund from the program office.[2]

To receive a refund, scholarship documentation must be submitted to the GET Program office on the letterhead of the awarding agency or institution, which includes the amount of the award.

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[1] If GET units were eligible but not used in a prior year, those units may also be used, in addition to the 125 annual usage limit.

[2] GET units may be used for 10 years after the student reaches the eligible benefit use year.

GET Annual Usage Limit

Beginning September 2002, students may use up to 125 eligible GET units per academic year, or the number of units available for use in their account, **whichever is less**. If a student has unused GET units after paying for tuition and fees, those units may be used to cover other eligible expenses, including other fees that are not state-mandated (but may be mandatory to the school), room and board (on or off-campus), books, and required supplies.

Any unused GET units from this academic year will be available for use during the next school year and beyond. GET units must be used within 10 years after the stated benefit use year.

SECTION IV: HOW TO INVOICE THE GET PROGRAM

The following information is needed on the invoice:
- ➢ Student's name
- ➢ Student's Social Security number
- ➢ Term and year the institution is billing for
- ➢ Add / Drop Date for 100 percent reimbursement
- ➢ Total amount due from GET
- ➢ Name and phone number of the person responsible for preparing the invoice

Note: The GET Program cannot pay from a statement. We must have an invoice.

The invoice must be submitted to the following address:
> **Guaranteed Education Tuition**
> **Attn: Institution Invoicing**
> **P.O. Box 43450**
> **Olympia, WA 98504-3450**

When to Submit an Invoice

Invoices will NOT be accepted until after the Add / Drop period has ended **for each term**. Invoices received before the end of the Add / Drop period will be rejected and must be resubmitted by the institution after the Add / Drop period. GET can only pay for the classes in which the student is actually enrolled.

The Payment Process

GET cannot pay an invoice until after the Add / Drop period has ended. If a student withdraws from a class for any reason and is due a refund, this should be resolved among the student, the student's parents, and the institution.

Payment of all invoices will be made directly to the college or university via electronic funds transfer (EFT), where available, or by warrant. The amount paid will be the lesser of the amount of the invoice received from the college or university or the remaining funds available in the beneficiary's GET account for use during that school year.

You can expect payment in 3-4 weeks from receipt of the invoice by the GET office.

SECTION V: INSTITUTION CONTACT INFORMATION

The Institution Contact Information Form helps the program staff provide accurate and updated information to the institutions in a timely manner. Please return this information (enclosed) as soon as possible and provide updated information when necessary.

Only the persons indicated as the point of contact on this form will be given authorization to enter the secure Web site and view the Eligibility Roster on-line.

SECTION VI: ELIGIBILTY ROSTER

The Eligibility Roster is a point-in-time report that lists all students currently eligible to use GET benefits. The roster includes each student's name, Social Security number and number of GET units available during the 2002-03 academic year. The report may change daily due to cancellations, depleted eligible units/dollars, or fees due. Once the school year begins, the total available amount will decline. A hard copy of the roster will be made available a few weeks before the school year begins. Updates to the roster will be made available to the points of contact for your institution (the individuals indicated on the Institution Contact Form) upon request and will be available for authorized users on the Program's Web site.

How to use the Eligibility Roster

The Eligibility Roster is a tool to help you verify a student's eligibility. Your first and foremost concern should be to verify that the student appears on the roster. Other pieces of information on the roster are a tracking mechanism on our part. A student may have indicated to the program his/her intent to enroll at a specific college or university and then change his/her mind without notifying the program. The information in this roster and our methods of delivering this information to you will become more consistent in time. If a student reports to the institution and indicates he/she has a GET account and is NOT on the eligible roster, the institution should call the Point of Contact at the GET office for verification of the student's eligibility or go to the Web site, if authorized.

The Eligibility Roster will be updated regularly on a secure Web site.

Viewing the Eligibility Roster On-Line

Enclosed are instructions for registering and accessing the Eligibility Roster on-line. An additional instruction sheet is enclosed for easy reference. Please note that initial registration takes a day or two to confirm.   Once your registration is confirmed, you may log on as often as necessary to check the updated Eligibility Roster.

The only persons who may register for on-line access to the GET Eligibility Roster are the persons indicated on the Institution Contact Information Form. If the contact information changes, please notify the GET program as soon as possible. GET staff will provide you with an updated form, and advise how to have the new person(s) register for access to view the eligibility roster on-line.

SECTION VII: INSTITUTION RESPONSIBILITIES

- Complete and submit the Institution Contact Information Form to the GET Program as soon as possible.
- Verify the student is on the Eligibility Roster (hardcopy or Web site) or call the GET office at 1-800-955-2318.
- Prepare invoice and submit to the GET Program AFTER the Add/Drop Period has ended.
- Maintain a copy of the School Notification Form.
- Update Institutional Contact Info with the GET office as needed.
- Contact the GET Program office with any questions at:
  1-800-955-2318, or e-mail GETInfo@hecb.wa.gov.

SECTION VIII: STUDENT RESPONSIBILITIES

The student must submit a Benefit Use Form to the GET Program office, complete the School Notification Form and submit it with a copy of their Account Summary to the school they will attend at the time of registration, and complete and submit Reimbursement Request Forms for expenses that cannot be directly billed from the school.

SECTION IX: CONTACTING GET

Contact the following GET staff to address any questions or concerns and/or verify student eligibility.

Primary: Heidi Jones, financial accountant   360-753-7877 or 800-955-2318, option "2"
heidij@hecb.wa.gov

Secondary: Jackie Molique, customer service manager   360-753-7875; 800-955-2318
jackiem@hecb.wa.gov
Larry Lee, operations manager   360-753-7874; 800-955-2318
larryl@hecb.wa.gov

The GET Program office is open Monday-Friday between 8 a.m. – 5 p.m. Pacific Time, except state holidays.

GET Web site: www.get.wa.gov
GET Program Office
PO Box 43450
Olympia, WA 98504-3450

SECTION X: ENCLOSURES

- Institutional Contact Form – (institution submits to GET Program as soon as possible)
- School Notification Form – sample (student submits to school with account summary)
- Instructions for Registering and Accessing GET Eligibility Roster On-Line through the secure Web site.